Monitoring Local Requests

Alma video: Physical Item and Move Requests

There will be times when it necessary to check on the status of a Request or Work Order. Requests refer to the acquisition, movement, manipulation, or processing of an item. Work Orders are requests for a specific action to be performed on a physical item, such as digitization or repair, and are sent to a specific department to complete that task. These tasks (e.g. Requests or Work Orders) may not show up in your Pick from Shelf list, either because something in the system is preventing the task from being moved forward in the workflow (Example: A request is made on an item currently on loan to another patron) or because the Request or Work Order belongs to a different local library location.

If you have the Fulfillment Operator or Fulfillment Service Manager role, you will be able to see all Requests and Work Orders from all UIU Libraries. If you have the Request Operator role, you will be able to see all Requests and Work Orders associated with your Library.

1. To view the status of a task, go to “Fulfillment” and select “Monitor Requests and Item Processes”.

2. This brings you to the Resource Requests Monitoring screen, where you can see Requests and Work Orders. You can use the facets in the left sidebar to sort and filter your results.
3. Use the persistent search box at the top of the screen to search for a specific request or title.

<table>
<thead>
<tr>
<th>Requests</th>
<th>All</th>
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4. Requests or Work Orders can be divided into two categories that can be searched using the facets under Workflow Step:
a. **Undefined tasks** are items that are pending in the system queue and cannot currently be fulfilled either because another task is taking priority or certain information is missing that would allow the task to move forward in the workflow. Undefined can be filtered for with the “Workflow Step” facet. Examples of undefined requests are those that have no item barcode successfully linked to it or the item requested is currently checked out to another patron.

b. **Defined tasks** are Requests or Work Orders that are currently in a workflow. Defined cannot be broadly filtered for like Undefined, but specific steps of a workflow such as “Pick from Shelf” or “Transit Item” can.

5. You can see who created the Request or Work Order, who the Request or Work Order is for, and the intended pick up location for the item to at the lower left-hand side of the task.
6. If the Creator is listed as System that means that it was requested through Primo.

7. For more information about the Request or Work Order, click on the number to the right of the “Place in Queue”. This number shows how many **priority** levels the task has in the Queue, NOT the total Requests or Work Orders made. The priority placed on the item is the order in which the system will process it.

Examples: The Place in Queue number will show 1 if the request is the next in line to be filled once the resource becomes available, 2 if it is 2nd in line to be filled, etc.

8. After clicking the “Place in Queue” you can see more information about the priority of the request, the type of patron the requester is, as well as the specific barcode of the item requested. Clicking the barcode will take you to the item information page.
9. Undefined tasks can be canceled, edited, or marked as missing by clicking Edit in the top right corner. Editing options include pick up location and adding notes to the task.

10. Requests or Work Orders with a defined workflow should display with additional information. Along with the creator of the task, who the request is for, and pick up location, you can also see what step of the workflow the item is currently in, its process status, its home library, and what date the item was last processed, as well as when the current task will expire.
11. You can get more information about the task by clicking on the number to the right of “Place in Queue”. Tasks in progress should have a “0” by their Place in Queue.

12. After clicking the “Place in Queue” number, you can see more information about the current activity of the request, the type of patron the requester is, as well as the specific barcode of the item requested. Clicking the barcode will take you to the item information page.

13. Defined tasks can be canceled, have their expiration updated, or have certain details of the task edited. You can also print a pick slip, move the item to a task list, or mark it as missing. All these options can be found in the upper right
of the task, though some options may not be available depending on its place in the workflow.